

*Coastal Synergy*  
ASSOCIATES



**OFFICE POLICIES AND AGREEMENT FOR CLINICAL SERVICES**

*This form provides you, the client, with information that is additional to that detailed in the Notice of Privacy Practices and it is subject to HIPAA preemptive analysis.*

*Please note: If the client/patient is a minor child and the parents are divorced, a copy of the DIVORCE DECREE indicating your rights to provide psychological services is required for our records prior to your child/adolescent receiving services.*

**CONFIDENTIALITY:** All information disclosed within sessions and the written records pertaining to those sessions are confidential and may not be revealed to anyone without your written permission except where disclosure is required by law.

**WHEN DISCLOSURE IS REQUIRED OR MAY BE REQUIRED BY LAW:** Some of the circumstances where disclosure is required or may be required by law are: where there is a reasonable suspicion of child, dependent, or elder abuse or neglect; where a client presents a danger to self, to others, to property, or is gravely disabled; or when a client's family members communicate to Coastal Synergy Associates that the client presents a danger to others. Disclosure may also be required pursuant to a legal proceeding by or against you. If you place your mental status at issue in litigation initiated by you, the defendant may have the right to obtain the clinical records and/or testimony by Coastal Synergy Associates. In couple and family services, or when different family members are seen individually, even over a period of time, confidentiality and privilege do not apply between the couple or among family members, unless otherwise agreed upon. Coastal Synergy Associates will use their clinical judgment when revealing such information. Coastal Synergy Associates will not release records to any outside party they are not authorized to do so by all adult parties who were part of the family services, couple services or other treatment that involved more than one adult client.

**EMERGENCY:** If there is an emergency during services, or in the future after termination, where Coastal Synergy Associates becomes concerned about your personal safety, the possibility of you injuring someone else, or about you receiving proper psychiatric care, we will do whatever they can within the limits of the law, to prevent you from injuring yourself or others and to ensure that you receive the proper medical care. For this purpose, we may also contact the person whose name you have provided on the biographical sheet.

**LITIGATION LIMITATION:** Due to the nature of the clinical process and the fact that it often involves making a full disclosure with regard to many matters which may be of a confidential nature, it is agreed that, should there be legal proceedings (such as, but not limited to divorce and custody disputes, injuries, lawsuits, etc.), neither you nor your attorney(s), nor anyone else acting on your behalf will call on Coastal Synergy Associates to testify in court or at any other proceeding, nor will a disclosure of the clinical records be requested unless otherwise agreed upon.

**CONSULTATION:** Coastal Synergy Associates consults regularly with other professionals regarding their clients; however, each client's identity remains completely anonymous and confidentiality is fully maintained.

**E-MAILS, CELL PHONES, COMPUTERS, AND FAXES:** It is very important to be aware that computers and email communication can be relatively easily accessed by unauthorized people and hence can compromise the privacy and confidentiality of such communication. Faxes can easily be sent erroneously to the wrong address. Emails, in particular, are vulnerable to unauthorized access due to the fact that Internet servers have unlimited and direct access to all emails that go through them. It is important that you be aware that emails, faxes, and important texts are part of the medical records. Additionally, Coastal Synergy Associates' emails are not encrypted. Coastal Synergy Associates' computer is equipped with a firewall, a virus protection, and a password and they also back up all confidential information from their computers on a regular basis. Please notify Coastal Synergy Associates if you decide to avoid or limit in any way the use of any or all communication devices, such as email, cell phone, or faxes. If you communicate confidential or private information via email, Coastal Synergy Associates will assume that you have made an informed decision, will view it as your agreement to take the risk that such communication may be intercepted, and will honor your desire to communicate on such matters via email. Please do not use email or fax for emergencies.

**RECORDS AND YOUR RIGHT TO REVIEW THEM:** Both the law and the standards of Coastal Synergy Associates profession require that they keep treatment records for at least 7 years. Coastal Synergy Associates uses a web-based software, MyClientPlus, for case documentation. Unless otherwise agreed to be necessary, Coastal Synergy Associates retains clinical records only as long as is mandated by Texas law. If you have concerns regarding the treatment records, please discuss them with Coastal Synergy Associates. As a client, you have the right to review or receive a summary of your records at any time, except in limited legal or emergency circumstances or when Coastal Synergy Associates assesses that releasing such information might be harmful in any way. In such a case, Coastal Synergy Associates will provide the records to an appropriate and legitimate mental health professional of your choice. Considering all of the above exclusions, if it is still appropriate, and upon your request, Coastal Synergy Associates will release information to any agency/person you specify unless Coastal Synergy Associates assesses that releasing such information might be harmful in any way. When more than one client is involved in treatment, such as in cases of couple and family

services, Coastal Synergy Associates will release records only with signed authorizations from all the adults (or all those who legally can authorize such a release) involved in the treatment.

**TELEPHONE & EMERGENCY PROCEDURES:** If you need to contact Coastal Synergy Associates between sessions, please leave a voice message or text at (361) 852-0988 or email at [info@coastalsynergyassociates.com](mailto:info@coastalsynergyassociates.com) and your call or email will be returned as soon as possible. Coastal Synergy Associates checks their messages a few times a day, unless they are out of town. If an emergency situation arises, indicate it clearly in your message and if you need to talk to someone right away call Psychiatric Emergency Services: (361) 986-9444, 24-hour crisis line: (888) 767-4493 or the Police: 911.

**PAYMENTS REIMBURSEMENT:** Clients are expected to pay the standard fee at the beginning of each session unless other arrangements have been made. Please notify Coastal Synergy Associates if any problems arise during the course of treatment regarding your ability to make timely payments. You will be expected to pay for each session at the time that it is held unless you have insurance coverage which may require a co-pay for each session. It is also important to recognize that if your insurance carrier denies payment for any reason, you are still responsible for paying your bill. Not all issues/conditions/problems, which are dealt with in treatment, are reimbursed by insurance companies. It is your responsibility to verify the specifics of your coverage. If your account is overdue (unpaid) and there is no written agreement on a payment plan, Coastal Synergy Associates can use legal or other means (courts, collection agencies, etc.) to obtain payment.

**Questions to ask your health insurance:**

1. Do I have insurance benefits for requested service?
2. What is my deductible and has it been met?
3. How many sessions per year does my health insurance cover?
4. What is the coverage amount per session?
5. Do I pay a co-pay each session?
6. Is approval/referral required from my primary care physician?

**MEDIATION & ARBITRATION:** All disputes arising out of, or in relation to, this agreement to provide clinical services shall first be referred to mediation, before, and as a pre-condition of, the initiation of arbitration. The mediator shall be a neutral third party chosen by agreement of Coastal Synergy Associates and the client(s). The cost of such mediation, if any, shall be split equally, unless otherwise agreed upon. In the event that mediation is unsuccessful, any unresolved controversy related to this agreement should be submitted to and settled by binding arbitration in (Nueces County, Texas) in accordance with the rules of the American Arbitration Association which are in effect at the time the demand for arbitration is filed. Notwithstanding the foregoing, in the event that your account is overdue (unpaid) and there is no agreement on a payment plan, Coastal Synergy Associates can use legal means (court, collection agency, etc.) to obtain payment. The prevailing party in arbitration or collection proceedings shall be entitled to

recover a reasonable sum as and for attorney's fees. In the case of arbitration, the arbitrator will determine that sum.

#### THE PROCESS OF TREATMENT/EVALUATION AND SCOPE OF PRACTICE:

Participation in services can result in a number of benefits to you including positive mental, physical, nutritional, and relational well-being. Working toward these benefits, however, requires effort on your part. Treatment requires your very active involvement, honesty, and openness in order to change your thoughts, feelings, and/or behavior. Coastal Synergy Associates will ask for your feedback and views on your treatment, its progress, and other aspects of the treatment and will expect you to respond openly and honestly. Sometimes more than one approach can be helpful in dealing with a certain situation. During evaluation or treatment, remembering or talking about unpleasant events, feelings, or thoughts can result in you experiencing considerable discomfort or strong feelings of anger, sadness, worry, fear, etc., or experiencing anxiety, depression, insomnia, etc. Coastal Synergy Associates may challenge some of your assumptions or perceptions or propose different ways of looking at, thinking about, or handling situations, which can cause you to feel very upset, angry, depressed, challenged, or disappointed. Attempting to resolve issues that brought you to treatment in the first place, such as personal or interpersonal relationships, may result in changes that were not originally intended. Clinical Treatment may result in decisions about changing behaviors, employment, substance use, schooling, housing, or relationships. Sometimes a decision that is positive for one family member is viewed quite negatively by another family member. Change will sometimes be easy and swift, but more often it will be slow and even frustrating. There is no guarantee that treatment will yield positive or intended results. During the course of treatment, Coastal Synergy Associates is likely to draw on various approaches according, in part, to the problem that is being treated and their assessment of what will best benefit you. These approaches include, but are not limited to, Intuitive Eating, Nutritional Counseling, behavioral, cognitive-behavioral, psychodynamic, existential, system/family, developmental (adult, child, family), interpersonal neurobiology, dialectical behavior therapy or psycho-educational. Coastal Synergy Associates provides neither custody evaluation recommendation nor medication or prescription recommendation nor legal advice, as these activities do not fall within their scope of practice.

TREATMENT PLANS: Within a reasonable period of time after the initiation of treatment, Coastal Synergy Associates will discuss with you their working understanding of the problem, treatment plan, treatment objectives, and their view of the possible outcomes of treatment. If you have any unanswered questions about any of the procedures used in the course of your treatment, their possible risks, Coastal Synergy Associates' expertise in employing them, or about the treatment plan, please ask and you will be answered fully. You also have the right to ask about other treatments for your condition and their risks and benefits.

TERMINATION: As set forth above, after the first couple of meetings, Coastal Synergy Associates will assess if they can be of benefit to you. Coastal Synergy Associates does not accept clients who, in their opinion, they cannot help. In such a case, they will give you a number

of referrals whom you can contact. If at any point during treatment, Coastal Synergy Associates assesses that they are not effective in helping you reach the clinical goals or that you are non-compliant, they are obligated to discuss it with you and, if appropriate, to terminate treatment. In such a case, they would give you a number of referrals that may be of help to you. If you request it and authorize it in writing, Coastal Synergy Associates will talk to the clinician of your choice in order to help with the transition. If, at any time, you want another professional's opinion or wish to consult with another clinician, Coastal Synergy Associates will assist you with referrals, and, if they have your written consent, they will provide their or him with the essential information needed. You have the right to terminate treatment at any time. If you choose to do so, and if appropriate, Coastal Synergy Associates will offer to provide you with names of other qualified professionals.

DUAL RELATIONSHIPS: Despite a popular perception, not all dual or multiple relationships are unethical or avoidable. Clinical services never involve sexual or any other dual relationship that impairs Coastal Synergy Associates' objectivity, clinical judgment or can be exploitative in nature. Coastal Synergy Associates will assess carefully before entering into non-sexual and non-exploitative dual relationships with clients. It is important to realize that in some communities, particularly small towns, military bases, university campus, etc., multiple relationships are either unavoidable or expected. Coastal Synergy Associates will never acknowledge working with anyone without their written permission. Many clients have chosen Coastal Synergy Associates as their clinician because they knew them before they entered treatment, and/or are personally aware of their professional work and achievements. Nevertheless, Coastal Synergy Associates will discuss with you the often-existing complexities, potential benefits and difficulties that may be involved in dual or multiple relationships. Dual or multiple relationships can enhance trust and clinical effectiveness but can also detract from it and often it is impossible to know which ahead of time. It is your responsibility to advise Coastal Synergy Associates if the dual or multiple relationships becomes uncomfortable for you in any way. Coastal Synergy Associates will always listen carefully and respond to your feedback and will discontinue the dual relationship if they find it interfering with the effectiveness of the treatment or your welfare and, of course, you can do the same at any time.

SOCIAL NETWORKING AND INTERNET SEARCHES: Coastal Synergy Associates does not accept friend requests from current or former clients on social networking sites. Coastal Synergy Associates believes that adding clients as friends on these sites and/or communicating via such sites is likely to compromise privacy and confidentiality. For this same reason, Coastal Synergy Associates request that clients not communicate with the via any interactive or social networking web sites.

CANCELLATION: Since the scheduling of an appointment involves the reservation of time specifically for you, a minimum of 24-hour notice is required for re-scheduling or canceling an appointment. Unless we reach a different agreement, \$30 will be charged for sessions missed

without such notification. Insurance companies do not reimburse for missed sessions. The \$30 fee will be due before or at the next appointment.